



Spring 2018

# NOTES OF INTEREST

## FDLCU Welcomes new Director of Lending



You may have noticed a new face in our Loan Department. We're happy to have Phil Jankowski as our new Director of Lending.

Phil joined our team at the end of January and he's no stranger to the Credit Union industry. He comes to us from Verve - A Credit Union where he was a Regional

Manager. Prior to working with Verve, he worked as a Loan Officer, then Branch Manager for Lakeview Credit Union. Phil earned his Bachelor of Science degree in English, with a Business Minor, from the University of Wisconsin - Oshkosh.

Phil and his family live in Neenah. He has been on the Board of Directors for Best Friends of Neenah-Menasha for six years. He also enjoys being a Youth Mentor for the organization which he has done for the past eleven years.

With fourteen years in the Credit Union industry and a true passion for helping people succeed, Phil is a great addition to our team.

## Financial Planner, Shelly Squier Is In the House!

Through a strategic alliance with Mass Mutual, Shelly Squier will now be on-site twice each month to help members with financial planning. She will be at the Credit union:

- The second Tuesday of the month from 1:00 to 5:00 p.m.
- The third Friday of the month from 9:00 a.m. to 1:00 p.m.

Shelly will also provide several presentations throughout the year on topics like Estate Planning, Financial Goal Setting and Investment Basics and, of course, Medicare.

## Thank You, From the Bottom of Our Hearts!



February is the month credit unions around the state show their support for the Children's Miracle Network. Through the Chain of Hearts program, our Basket Silent Auction, Employee Jean Days and the Valentine's Day CU Match, we were able to send a check to the Children's Hospital Foundation in the amount of \$1,395! Thank you from the bottom of our hearts to all who purchased a heart, link, basket or made a donation of any kind!

There have been no changes to our Privacy Policy in the past year. If you wish to review the Privacy Policy, you can find it on our website at: <https://www.fdlcu.com/privacy-policy.html>. You can also ask for a copy when you stop in the office.

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# SUMMER CLOSINGS



**Fond du Lac Credit Union will be closed  
In Observance of Memorial Day:**

Saturday, May 26  
Monday, May 28

**In Observance of Independence Day:**  
Wednesday, July 4

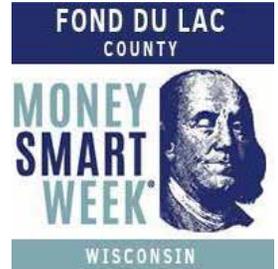
## Get Your Money Smart On!

**MONEY SMART WEEK April 21-28**

What is Money Smart Week?

Money Smart Week® is a public awareness campaign designed to help consumers better manage their personal finances. Sounds pretty technical, huh? It's really not! Actually, it's all our neighborhood businesses and people we already know coming together to share some great knowledge and tips that can help us all do better with our money. It's happening all across the country through businesses, financial institutions, schools, libraries, not-for-profits, government agencies and the media, and Fond du Lac County is part of it! These groups come together once a year to stress the importance of financial literacy, inform consumers about where they can get help and provide free educational seminars and activities throughout the week. Programming is offered to anyone and everyone - and covers all facets of personal finance from establishing a budget to first time home buying to estate planning.

Watch the Action Advertiser for a complete listing of times and dates for Money Smart events and get Money Smart!



### SUMMER FUN... THEME PARK TICKETS!



<u>General Admission Gate Price</u>	
One day	\$40.35
Kids 48" & under	FREE

**Our Price**  
**\$28.00**



<u>General Admission Gate Price</u>	
One day	\$71.99
Kids 2 & under	FREE

**Our Price**  
**\$48.00**

**Tickets sold to CU members only!**

## 63rd Annual Meeting Update

Fond du Lac Credit Union's 63rd Annual Meeting was held at 5:15 p.m. on March 15 in the Conference Room at FDL CU. Incumbents Bernie Bonlander, Amy Collett and Hannah Smet were re-elected.

If you were unable to attend the meeting and would like a copy of the information that was provided, please send your request by e-mail to [info@fdlcu.com](mailto:info@fdlcu.com) or call us at 921-1123.

## A Member's Question

A Credit Union member stopped a few weeks ago. She had been sorting through some paperwork, throwing things away, and came across an old letter dated 1988. It was from CUNA Mutual with the offer of \$1,000 in free Accidental Death and Dismemberment Insurance that she had signed up for way back then. She wasn't sure she even had the coverage any more. I explained that the name had been changed to Trustage Insurance and I asked her to hold on to the letter and told her I would contact CUNA Mutual Group to find out about her Trustage Insurance coverage.

When I called and spoke with a representative from Trustage and asked about our member's coverage, she said if a member signs up for the insurance and remains a Credit Union member the coverage stays in force. She found our member's information right away and said that she would mail her updated material about the AD & D coverage.

So if you signed up for \$1000 of free Accidental Death and Dismemberment insurance in the past and are still a CU member, rest assured that you still have it! For more information call Trustage at 1-800-428-3932.

### *If you're going to be traveling:*

- Be sure to let us know so we can place a travel notice on your account.

- Consider taking a Travel Money Card to make purchases instead of using your debit card. It's safer!

- Have a great trip!

